IT DIRECT™

ITDirect™ User Manual

Requester

Version 2.0

SchoolDude.com, Inc.

SchoolDude Support:
Phone: 1-877-883-8337
Email: support@schooldude.com

Table of Contents:

Requester **1**
I. So You're a Requester! Now What? 1
II. You Are here: The Incident Request Page 5
III. The Settings Page 7
IV. The Incident Request 10
V. My Requests 13
VI. Search Knowledge Base 15
VII. The Help Tab 17

Requester Guidelines

I. So You're a Requester! Now What?

(Getting started with MySchoolBuilding.com.)

MySchoolbuilding.com is where you as a Requester will go to make all of your new incident requests. There are two ways that a Requester can be entered into the system:

- The ITDirect Administrator can add the Requester into the system.
- The Requester can add their self into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

1. Go to www.myschoolbuilding.com.

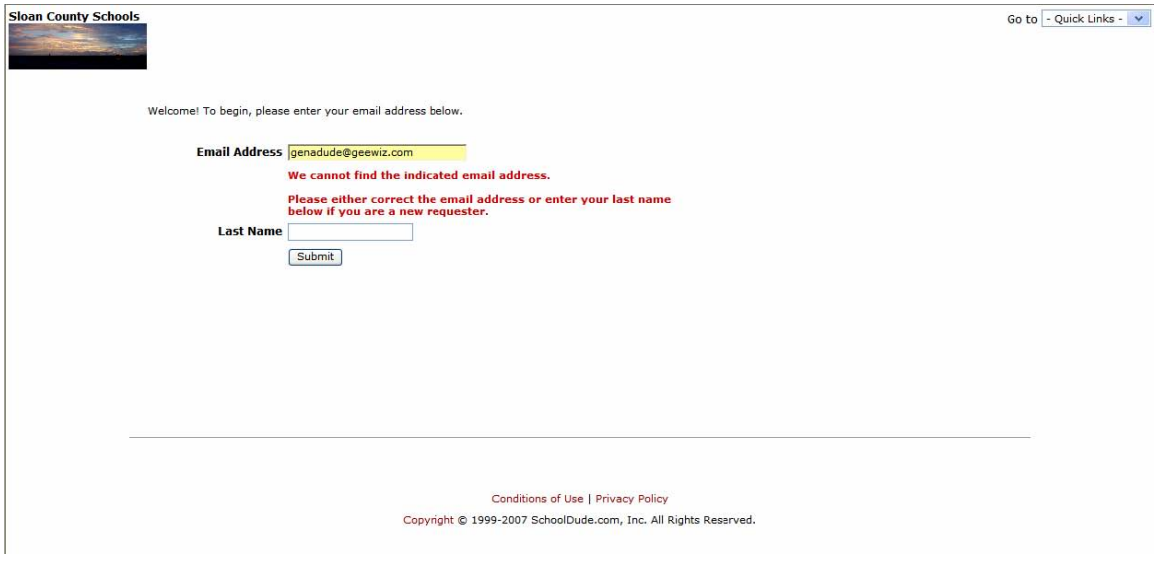
2. You will see the following page:

This is the MySchoolBuilding.com login page for your educational facility. You will see your facility's name and/or logo in the top left-hand corner and the words "MD Login" in the top right. See below:

3. Enter your email address in the space provided.

4. Click Submit.

5. As you are a new Requester, you will then see the following page:


Sloan County Schools
Go to - Quick Links -
Welcome! To begin, please enter your email address below.
Email Address genadude@geewiz.com
We cannot find the indicated email address.
Please either correct the email address or enter your last name below if you are a new requester.
Last Name
Submit
Conditions of Use | Privacy Policy
Copyright © 1999-2007 SchoolDude.com, Inc. All Rights Reserved.

SCHOOLDUDE SAYS: If this page doesn't come up when you enter your email address and you see an entirely different page with the word "Welcome" at the top, you have entered your email address incorrectly.

6. Enter your last name into the box provided.

7. Click Submit.

8. Next, you should see the page below:

Sloan County Schools
Go to - Quick Links -
Welcome! To begin, please enter your email address below.
Email Address genadude@geewiz.com
Please select your name from the below list or select the "not listed" option.
Bob Dude bdude@geewiz.com
Ed Dude edude@geewiz.com
Erin Dude erindude@geewiz.com
Fred Dude fdude@geewiz.com
Jane Dude jdude@geewiz.com
Jenn Dude JennDude@email.com
Sam Dude sdude@geewiz.com
Will Dude wdude@geewiz.com
My name is not listed
Submit

9. Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot.

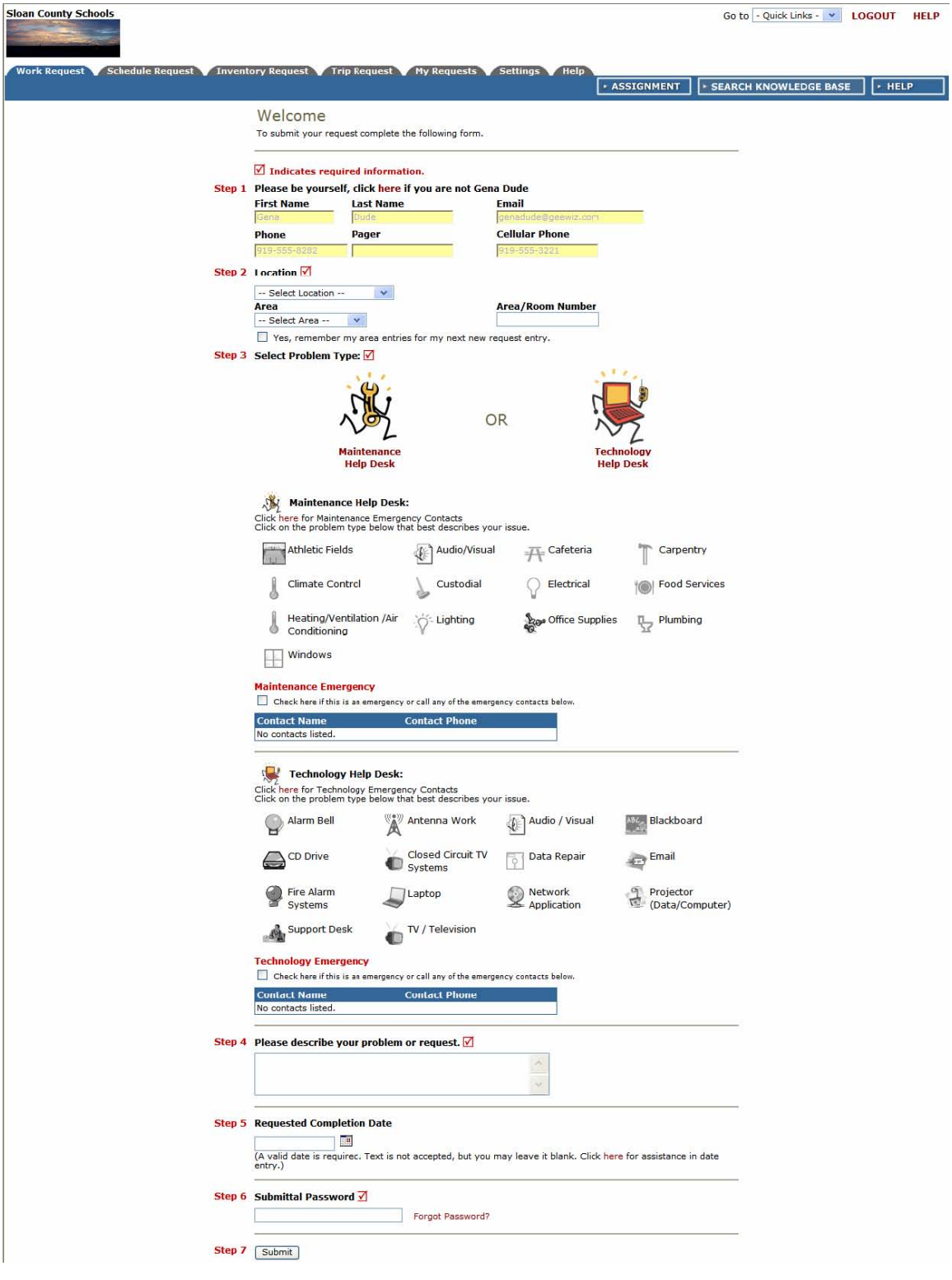
10. Click Submit.

11. The page you see next should look something like this:

12. Your last name and email address should already be filled in. Fill in the remaining fields (first name is the only one required) if you wish.

13. Click Submit.

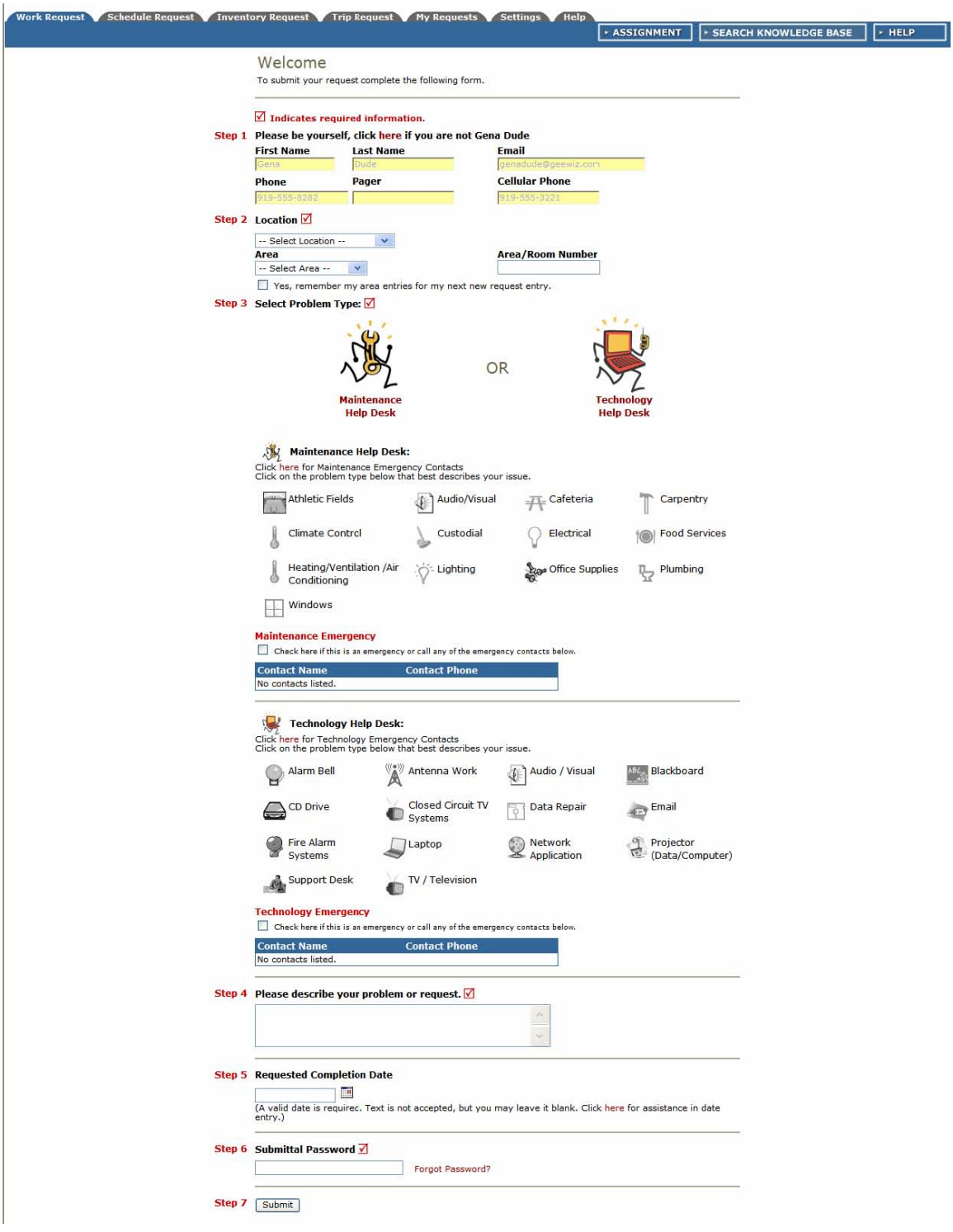
14. The next page you are taken to should look something like this (see next page):



15. This is the point where all Requesters start once they are in the system: the **Work Order/IT Incident Request form**. Welcome aboard!

II. You Are Here: The Incident Request Page.

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the incident request page. This serves as your **Home** page for MySchoolBuilding.com and should look something like this:



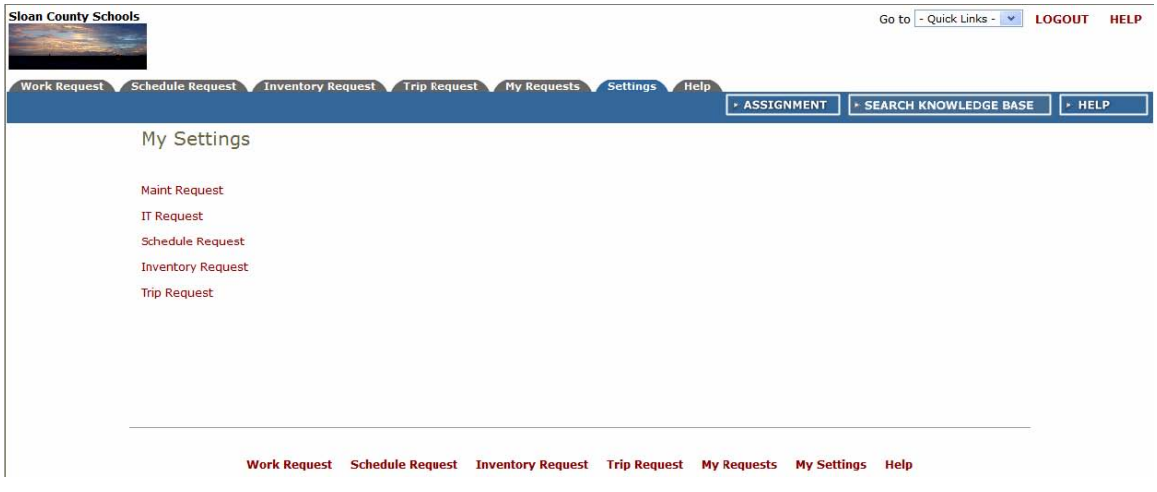
Across the top of the page, you'll notice several tabs, depending on which SchoolDude products your facility uses. The tabs shown above are labeled "**Work Request**" (for MaintenanceDirect and ITDirect clients), "**Schedule Request**" (for FSDirect clients), "**Inventory Request**"(for InventoryDirect clients), "**Trip Request**" (for TripDirect clients), "**My Requests**", "**Settings**", and "**Help**". These tabs are how you navigate to the information that you need. In the following sections, we'll show you around MySchoolBuilding.com and each tab will be explained. You'll see what they contain and how to use them. (We'll get into the actual incident request a little further along.)

- Simply click on the type of requests you'll make for the product you're using. In this case, click the IT Request link. You'll be taken to the Settings page for IT Direct users.

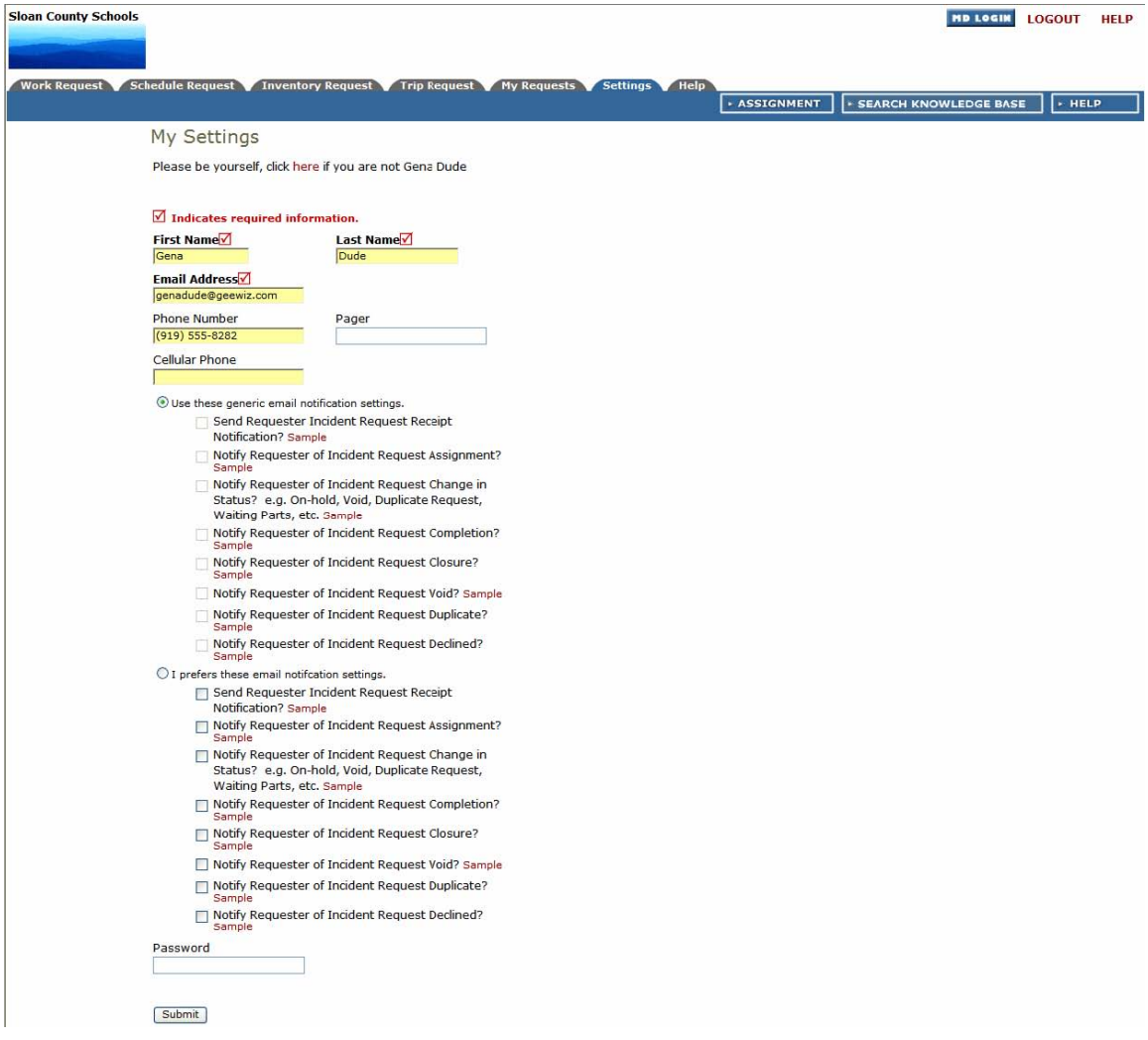
III. The Settings Page: Your Information in a Nutshell.

Before we get started in a bit with making incident requests, let's take a moment to check out the **Settings** page, which contains your information as entered by the Administrator during the Account Setup process. If you set up your own account, this page will show the information you entered earlier. Use this page to edit your information.

If your facility uses more than one SchoolDude product, you'll see this page when you click the Settings tab:



The **Settings** page looks like this:


Sloan County Schools
MD LOGIN
LOGOUT
HELP
Work Request
Schedule Request
Inventory Request
Trip Request
My Requests
Settings
Help
ASSIGNMENT
SEARCH KNOWLEDGE BASE
HELP
My Settings
Please be yourself, click here if you are not Gena Dude
Indicates required information.
First Name
Gena
Last Name
Dude
Email Address
genadude@geewiz.com
Phone Number
(919) 555-8282
Pager
Cellular Phone
Use these generic email notification settings.
Send Requester Incident Request Receipt Notification? Sample
Notify Requester of Incident Request Assignment? Sample
Notify Requester of Incident Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. Sample
Notify Requester of Incident Request Completion? Sample
Notify Requester of Incident Request Closure? Sample
Notify Requester of Incident Request Void? Sample
Notify Requester of Incident Request Duplicate? Sample
Notify Requester of Incident Request Declined? Sample
I prefers these email notifcation settings.
Send Requester Incident Request Receipt Notification? Sample
Notify Requester of Incident Request Assignment? Sample
Notify Requester of Incident Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. Sample
Notify Requester of Incident Request Completion? Sample
Notify Requester of Incident Request Closure? Sample
Notify Requester of Incident Request Void? Sample
Notify Requester of Incident Request Duplicate? Sample
Notify Requester of Incident Request Declined? Sample
Password
Submit

- Make any changes you wish to make, enter your password at the bottom

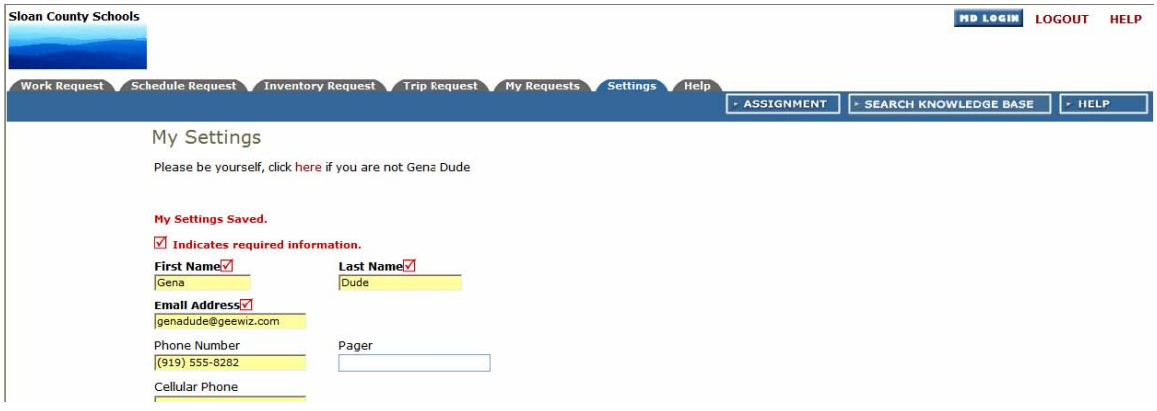
OR

- To continue without making any changes, simply click the Back button at the top of your page or click the Tab of the page you wish to go to next.

- Enter your password in the space provided.

- Click the Submit button.

If you have made changes, the page will refresh to bring up the same screen only now, the words "My Settings Saved" will appear in red at the top of the page (see below). That's it! Proceed by clicking the Tab of the page you'd like to go to next, up near the top of the screen.



IV. The IT Incident Request: ITDirect in Action

Now that you've logged in and checked out your settings page to make sure that all of your information is correct, we'll move on to what you're really here for: making incident requests.

The **Work Request** page (reached by clicking the work request tab near the top of the page from wherever you are in MySchoolBuilding.com) displays the form you'll fill out each time you want to request that work be done. Those fields marked with a red check-mark in a box (☑) are required and can't be skipped. The rest, you should just fill in as you are able to make the incident request as detailed and helpful to those processing it as possible (this can speed the process up a bit).

Here again is a view of the incident work request page (see the next page):

Work Request | Schedule Request | Inventory Request | Trip Request | My Requests | Settings | Help

▸ ASSIGNMENT | ▸ SEARCH KNOWLEDGE BASE | ▸ HELP

Welcome

To submit your request complete the following form.

☑ Indicates required information.

Step 1 **Please be yourself, click here if you are not Gena Dude**

First Name	Last Name	Email
Gena	Dude	genadude@geewiz.com

Phone	Pager	Cellular Phone
(919) 555-8282		

Step 2 **Location** ☑

-- Select Location --

Area -- Select Area --

Area/Room Number

☐ Yes, remember my area entries for my next new request entry.

Step 3 **Select Problem Type:** ☑

Maintenance Help Desk

OR

Technology Help Desk

Maintenance Help Desk:

Click here for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

- Athletic Fields
- Audio/Visual
- Cafeteria
- Carpentry
- Climate Control
- Custodial
- Electrical
- Food Services
- Heating/Ventilation /Air Conditioning
- Lighting
- Office Supplies
- Plumbing
- Windows

Maintenance Emergency

☐ Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Technology Help Desk:

Click here for Technology Emergency Contacts
Click on the problem type below that best describes your issue.

- Alarm Bell
- Antenna Work
- Audio / Visual
- Blackboard
- CD Drive
- Closed Circuit TV Systems
- Data Repair
- Email
- Fire Alarm Systems
- Laptop
- Network Application
- Projector (Data/Computer)
- Support Desk
- TV / Television

Technology Emergency

☐ Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 **Please describe your problem or request.** ☑

Step 5 **Requested Completion Date**

(A valid date is required. Text is not accepted, but you may leave it blank. Click here for assistance in date entry.)

Step 6 **Submittal Password** ☑

Forgot Password?

Step 7 Submit

Follow these steps to fill out the form (It'll only take a minute or two!):

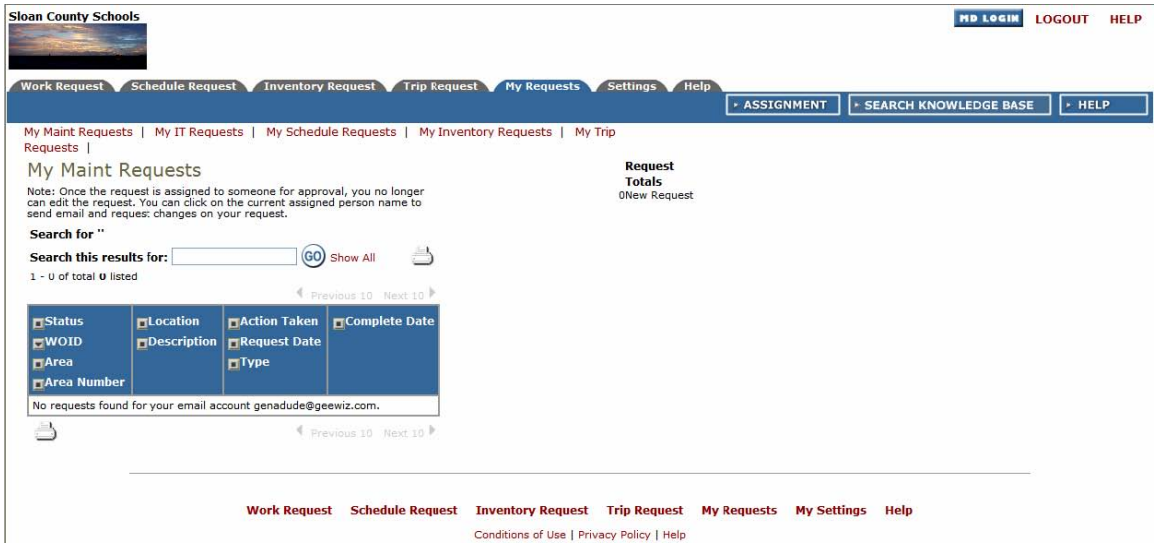
- **Step 1:** Be yourself. Make sure that it's your information in the contact spaces provided. If not, click the word "here", shown in red, to log in as yourself.
- **Step 2:** Enter your Location, Area, and Area Number.
- **Step 3:** Select the Problem Type that best describes your issue: Maintenance Help Desk or Technology Help Desk.
- Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle that says "OK".
- If this is an emergency, check the Technology Emergency box below the problem types list.
- **Step 4:** Describe the IT Direct Technology problem or request.
- **Step 5:** Enter the Requested Completion Date. Click the calendar icon next to the date field to choose a date from the calendar.
- **Step 6:** Include any attachments, if necessary.
- **Step 7:** Enter your submittal password.
- **Step 8:** Click Submit.

You will then be taken to the **My IT Requests** page, which will show listed among other requests, the new incident request you just made. We will cover this page in more detail in the next section.

Since we're working with ITDirect, click the ITDirect Technology Help Desk icon. This will bump you to the maintenance issues and down to the technology ones. Some examples are Requester Audio/Visual, Email, Laptop, etc. These problem types were specifically selected by the Administrator of your account for use at your facility.

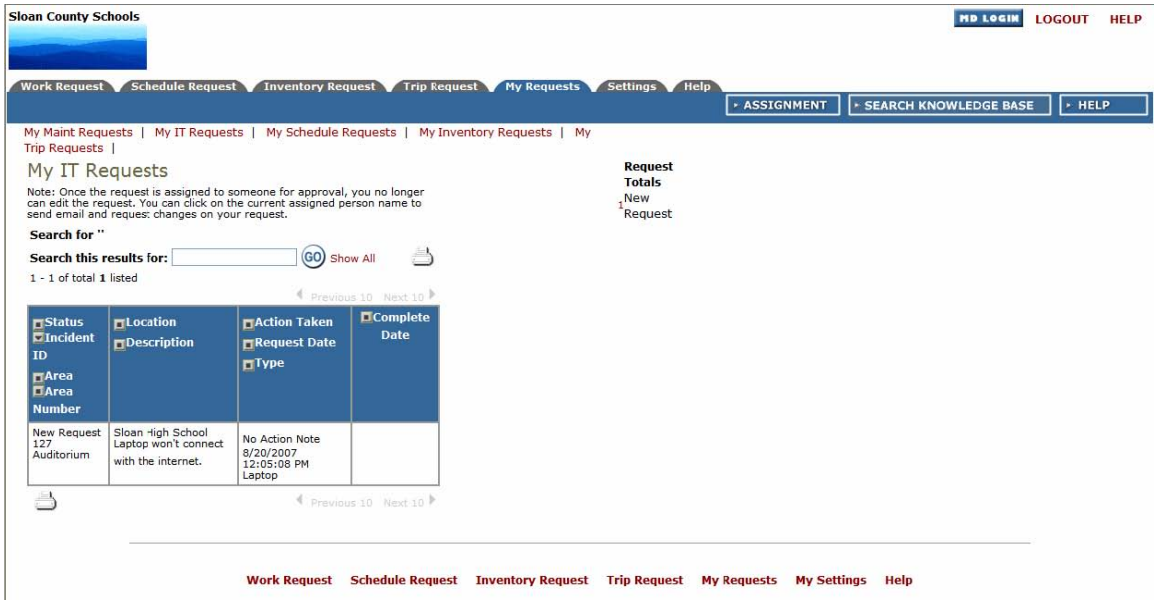
V. My Requests: Keeping Track of Your Requests.

The **My Requests** page gives you a look at all the work requests you've made in ITDirect. You can reach the **My Maint Requests** page by clicking on the tab at the top of the **Home** page. It should look something like this, depending on how many requests you've submitted:



As you've probably noticed, this page is labeled for maintenance requests and will show all of any requests you've made in SchoolDude, for any products you work with.
To specify IT Requests, click the My IT Requests link near the top of the page, shown in red. See below:

The **My IT Requests** page looks very similar to the last page we were on. The only difference is that now, you'll only see IT incident requests you've made. See below:



Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.

You can print your requests using the Print icon near the bottom left-hand corner of the page:

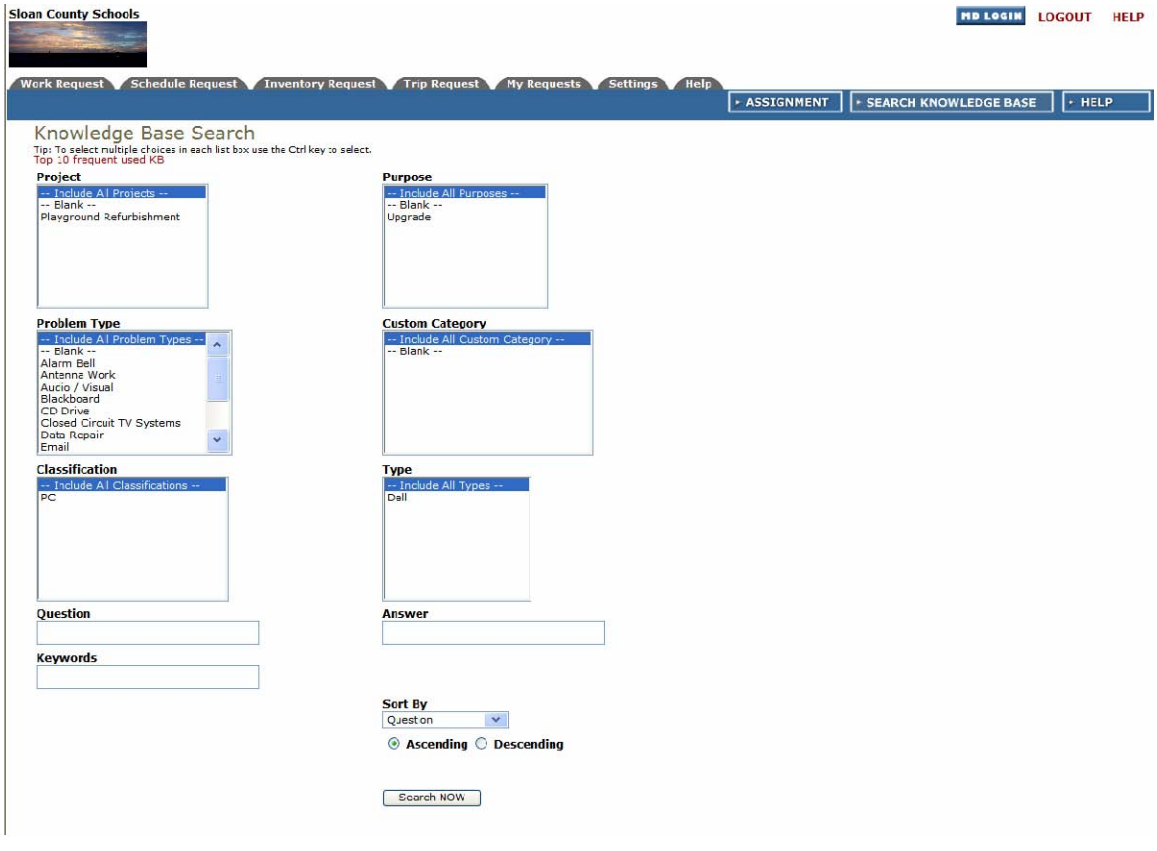
To search your requests, enter a key term in the **Search** field, located just above your request list, then click Go. To show all requests (after searching for work orders), click the Show All link.

To view only requests of a certain status, click the number next to the status under the "Request Totals' section (near the top, right-hand corner).

VI. Search Knowledge Base: Answers to Frequently Asked Questions.

The purpose of the Knowledge Base is to assist all users of ITDirect by giving the answers to recurring questions to see if they can correct the current issue on their own. The Administrator of your account has the ability to enter frequently asked questions, along with their answers, which you can then search to find the answers you need. You can even search by answer!

Get started by clicking the Search Knowledge Base link, shown near the top, right-hand side of your page.
It will look something like this, depending on how much information your Administrator has entered to this point:



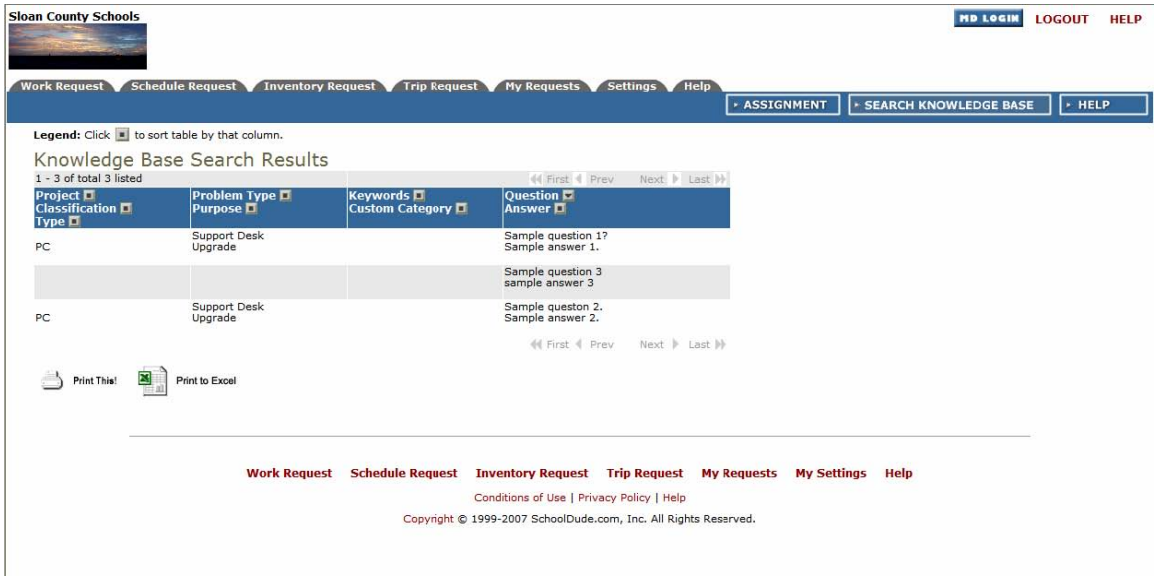
In the boxes provided, select the following from the options given:

-
- Proj
- Problem
- Custom
- Category
- Classificat
- ion
- y
- p
- e

Next, enter:

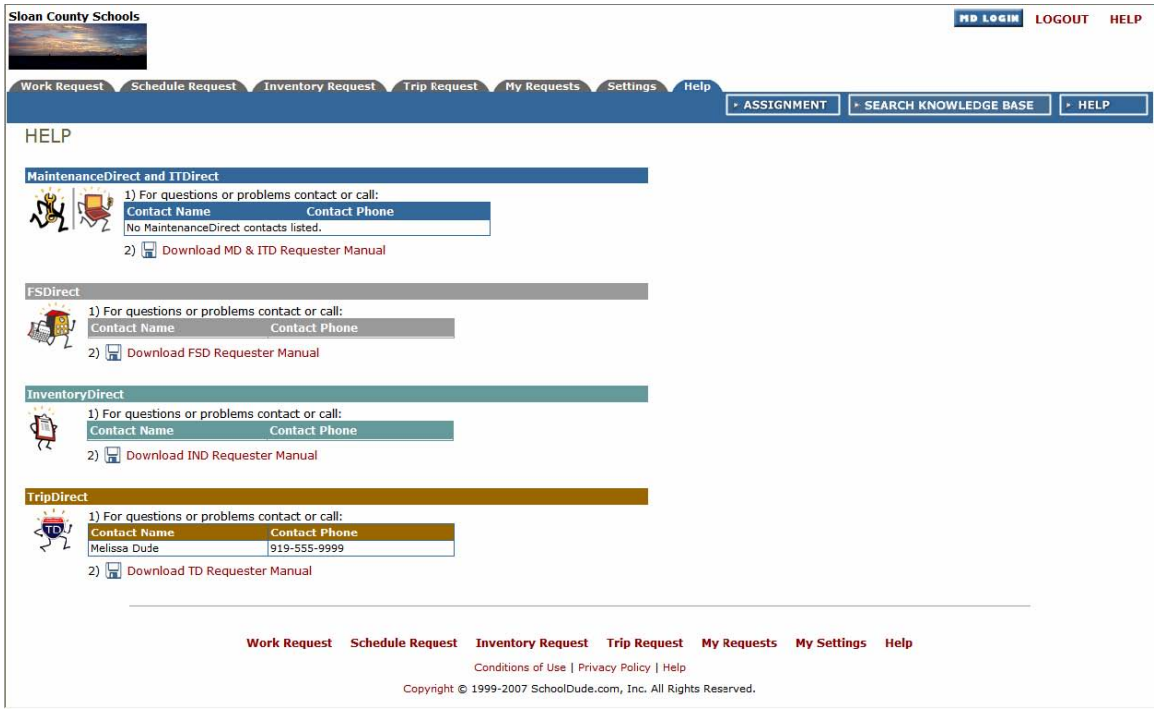
- Your question.
- Answer.
- Any Keywords you wish to include.
- Choose your "Sort By" category: Question, Answer, Keyword, Project, Purpose, Problem Type, Custom Category, Classification, or Type.
- Then choose whether to sort by ascending or descending order.
- Click the Search Now button.

If a question fitting your criteria has been entered into the system, you'll be taken to the **Knowledge Base Search Results** page, which looks like this:



VII. The Help Tab: Where to Go With Your Questions.

We know that sometimes you have questions or issues that you need to speak with someone about specifically. For that reason, we've provided the **Help** page (reached by clicking the tab at the top of the page), which looks like this:



On this page, you'll see contact information for each of the SchoolDude products you have access to. These contacts are people at your facility that you can call directly with any questions or concerns you may have. Also provided are the manuals for each separate product.